B0600-1-4

RESULTS

Atlas Van Lines
18th Annual Survey
of Corporate Moving Practices

Atlas® Van Lines

According to the 18th Annual Survey...

Atlas Van Lines once again extensively analyzed prominent trends in corporate relocation. The annual Survey of Corporate Moving Practices, first conducted in 1968, is eagerly awaited and used by the major segments of the relocation industry and by the transportation industry as well.

The 65-question 18th Survey was sent to more than 6,000 United States corporations, including the "Fortune 1,000." Most of the companies had 1984 sales of more than $100 million (68 percent), with the biggest percentage employing 100-499 salaried people (24 percent). About half of the companies (49 percent) had traffic or transportation departments administering their corporate moving policies. That's a mild reversal from last year, with most of the respondents working in the personnel or human resources area (64 percent last year).

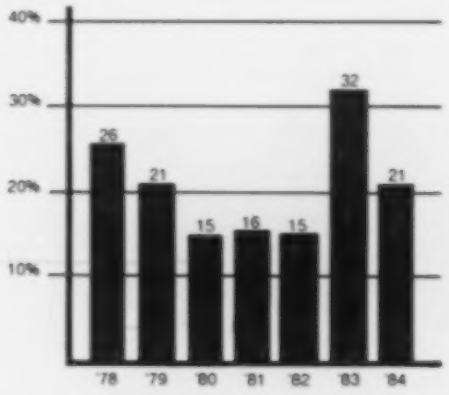
More than half (57 percent) of this year's respondents were in the manager category. The majority of those people have been involved with employee relocation for 2-10 years (56 percent), and 1 out of every 7 has been in that area for more than 20 years. A higher percentage this year was male (73 percent versus 65 percent).

Most of the companies arranged fewer than ten relocations in 1984. And in 67 percent of the companies, relocations are handled from a centralized transportation department, not regionally.

In the companies without a centralized department, more than half (51 percent) make the carrier selection without consulting the employee. Only 8 percent of those non-centralized companies allow the employee alone to make the selection, and about a third (35 percent) work with the relocating employee to make the choice. Again this year, most of the companies (67 percent) are manufacturers, with 26 percent involved in service. Most of them are national (28 percent) or international (64 percent), and they tend to be multidivisional (65 percent).

Projected changes in the number of employees the companies anticipate moving during 1985 show variations from previous results--in 1983, 32 percent of the companies expected to increase the number of employees they would move in 1984. For 1985, only 21 percent look to move more employees than in 1984.

Percentage of companies anticipating moving more employees during 1985 then were moved in 1984.



The average, relocating salaried employee can reasonably expect to be moved less frequently than every five years (70 percent of the responses indicated that), and the next most likely category was every third year (14 percent). And for 90 percent of the companies, those relocating employees represent less than 11 percent of the salaried work force. Women remain much less likely to relocate--32 percent of the companies had no female transfers in 1984, and less than 5 percent of the transferred employees of an additional 41 percent of the companies were women.

All of those figures are in the context of the following 1984-versus-1983 comparison: 49 percent of the respondents indicated thay had more transfers in 1984; 13 percent had fewer, and 38 percent had about the same number.

A new question this year determined that 75 percent of the most frequently transferred salaried employees are 31-40 years old--7 percent are 41-45, and only 2 percent are more than 45. Most transferred employees are salespeople (39 percent), followed by plant/facility managers (17 percent) and engineers (16 percent).

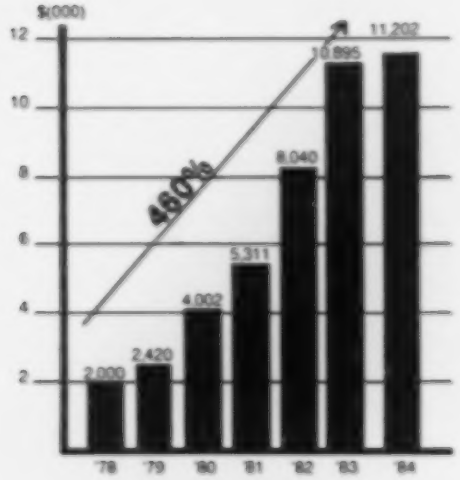
Another new statistic this year revealed that 49 percent of the most frequently transferred salaried employees earn $31,000-$40,000; 23 percent are between $26,000 and $30,000, with 21 percent in the $40,000-plus range. Only 7 percent earned less than $25,000.

In 1983, as the country clearly saw the light at the end of the dark tunnel of economic recovery, only slightly more than half of the companies (54 percent) indicated that economic conditions had an external impact on the changing numbers of employee transfers. In 1980, the figure was 93 percent. A year later, it was 95 percent, and in 1982, it fell to 78 percent. Last year, in the midst of a full-blown regeneration of steady economic growth, that percentage fell to 31. Clearly, a healthy national economy is a good indicator of increased, future corporate relocations.

Also positively affecting the activity of moving the household goods of transferred employees were internal company conditions--factors like promotions (40 percent of the companies cited that element), corporate reorganization (27 percent), expansion into new territories (23 percent), expansion of facility (22 percent), and increased production (18 percent). Again, comparing those measurements with similar readings from the early 1980s, there is a more positive economic climate today.

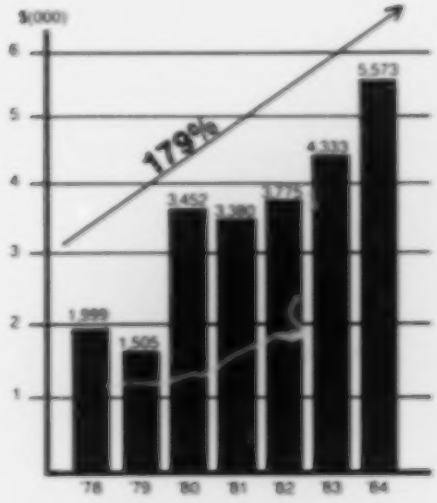
For domestic moves, costs continue to climb. The average for moving "extras"--relocation services, hotel accommodations, family transportation, meals, house-hunting trips, and so on--was above the 1983 record level and represents the seventh consecutive increase. The 1984 figure--$11,202--is a 460 percent increase from the $2,000 figure for 1978.

Cost for moving "extras."



The average direct van line packing and transportation services cost was $5,573--that's a 29 percent jump from 1983 and a 179 percent increase from the $1,999 figure for 1978. Although those costs are high, they represent--for 60 percent of the companies--30 percent or less of the total cost of relocating an employee.

Average cost of direct van line packing and transportation services.



Trends continue to echo an increased concern for the transferee's future needs in his new location and for the needs of his family. Full reimbursement of moving expenses is provided by 85 percent of the responding companies, and 65 percent allow more than one expense-paid house-hunting trip, an increase from the last few years. At the same time, 88 percent of the companies allowed three or more days for each trip. Spouses are also being allowed to go along at employer expense--41 percent of the companies pay for one trip, while an additional 55 percent cover the cost of at least two trips.

Until 1984, the percentage of companies whose average employee relocation is almost always or frequently affected by his spouse's employment status nad been about 23. But last year, the figure jumped to 35 percent. When the spouse is employed full-time with another company, that situation, in 50 percent of the cases, increased the relocation complications of the transferee's company.

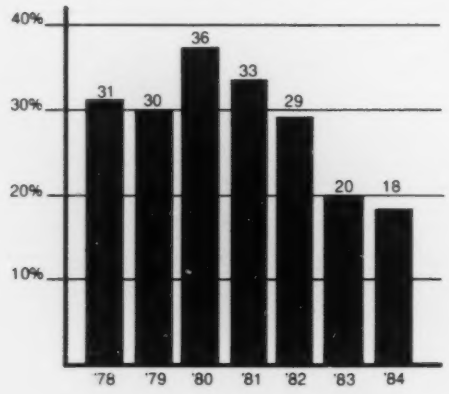
Companies are continuing to purchase the residences of relocating employees if other buyers can't be found within a reasonable time. In 1984, 39 percent of the companies provided that service. The most common method of determining the sale price is to pay the average of several appraisals. That's what happens at 58 percent of the companies that buy the residence, which is far more typical than making an arrangement with a national realtor (20 percent of the companies did that).

That and other benefits are increasingly being offered to relocating employees--benefits like paying a lease-termination penalty (56 percent of the responding companies), paying all of the fees connected with the purchase or sale of a residence (53 percent), offering a mortgage interest differential (52 percent), assisting with a mortgage or swing loan (41 percent), and paying a cash bonus (31 percent).

About 69 percent of the responding companies had at least one employee turn down an opportunity to relocate during 1984, the average figure since 1976. But those employees who refused a transfer represent less than 2 percent of their companies' work force in the majority of cases (62 percent of the companies).

Since 1980, fewer employees are turning down a transfer. That year, 36 percent of the companies reported that refusals to relocate increased over the previous year. Over the course of the next three years, that measurement fell to 33 percent (1981), 29 percent (1982), and 20 percent (1983). Last year, it fell again--to 18 percent. As a related point, declining the opportunity to relocate hindered an employee's career at 42 percent of the companies that responded, and that's a new high for the last several years.

Percentage increases of refusals to relocate versus the previous year.



Much the same as in the past are the reasons for declining a move: cost of living in the new location (31 percent of reporting companies indicated that reason), family ties (28 percent), spouse's employment (25 percent), housing/mortgage concerns (24 percent), and the lack of a desire to move (24 percent).

Turning to the regulatory environment--especially since the passage of the Household Goods Transportation Act of 1980--two ways of doing business continue to be selected as the most beneficial by-products of deregulatory legislation: contracts (35 percent of the companies) and volume discounts (32 percent). Directly connected to that contract-related benefit, the percentage of companies operating without a carrier contract fell from 54 in 1983 to 26 last year.

At the same time, presumably as a reflection of the buyer's (the shipper) continuing strong position in the marketplace versus the seller's (the carrier), 59 percent of the responding companies have contracts with more than one carrier, more than double the 1983 figure. Most companies are pleased with their contract carriage arrangements--91 percent rated them excellent or good.

Service, particularly in terms of dependability and flexibility, was the main guideline used to evaluate carriers--70 percent of the companies ranked that element first, followed by price and claims (43 percent each) and employee feedback (35 percent). Service was also the primary factor companies used to select carriers (74 percent), with price and reputation (48 percent each) of secondary importance.

This year's Survey added questions about insurance coverage of transported goods. Most of the companies (42 percent) use full replacement value protection; 34 percent transport at a released rate of 60¢ per pound, per article; and 24 percent use declared value protection (based on depreciation). Of the 34 percent that ship at a released rate, nearly half (45 percent) are self-insured at full replacement cost, and about a quarter (23 percent) instruct the carrier to settle as fully insured, charging the difference to the insurer.

Of the companies using declared value protection, 80 percent felt the appropriate dollar-per-pound valuation was less than $4.00. Those companies not arranging for full replacement value are very reluctant to do so--only 16 percent plan to make such a change. Finally, for companies using replacement value protection, 65 percent arrange for coverage from the van line, while 35 percent secure insurance from an insurance carrier, and 31 percent are self-insured under an in-house risk management program.

A final question this year measured the effect of deregulation--or "reregulation," as some observers prefer--on several industries. In terms of users and providers, companies evaluated the airlines, general commodity trucking, household goods moving, communications, and finance. On average, 85 percent of the responses indicated those industries

were better, since deregulation, for all or some of their users. For providers in those five areas, deregulation effects again were positive, but only at a 68 percent rate.

Other important Survey findings include the following: (1) 21 percent of the companies use a relocation service, and companies with 0-9 yearly interstate moves were the most frequent users of such a service (32 percent of the companies in that category); (2) of companies using a relocation service, 26 percent were national, and 67 percent were international; and (3) of companies using a brokerage service, 14 percent were national, and 86 percent were international.

The 18th Survey is available at no charge from Atlas' Public Information Department. Findings from this year's questionnaire will help the major household goods carriers more efficiently meet their corporate customers' increasingly complex needs. As a direct result, both shippers and carriers benefit, and the moving industry in general is also a major beneficiary.

ATLAS VAN LINES, INC.

18th Annual Survey
of
Corporate Moving Practices

NOTE: For the following questions--8, 21-23, 26, 30, 41, 48, 60-63, and 65--percentage totals exceed 100 because the Survey asked for more than one response to each question. Also, because percentages have been rounded up, some totals in the other questions may not exactly equal 100.

PART ONE--Individual and Corporate Profile

1. Which one of the following categories best represents the focus of your department?

(a) Personnel/Human Resources 31%
(b) Traffic/Transportation 49%
(c) Administration 6%
(d) Purchasing 4%
(e) Industrial Relations 1%
(f) Special Services 1%
(g) Real Estate 1%
(h) Finance 1%
(i) Personnel/Compensation and Benefits 2%
(j) Law 0%
(k) Marketing 1%
(l) Other 3%

2. Which one of the following categories best describes your position within the company?

(a) President 2%
(b) Vice-President 5%
(c) Assistant Vice-President 2%
(d) Manager 57%
(e) Director 8%
(f) Owner 1%
(g) Major Stockholder 0%
(h) Other 26%

3. How long have you been involved with employee relocation?

(a) Less than 2 years 16%
(b) 2-5 years 32%
(c) 6-10 years 24%
(d) 11-15 years 8%
(e) 16-20 years 5%
(f) More than 20 years 15%

4. Are you . . .

(a) Male? 73%
(b) Female? 27%

5. Approximately how many interstate employee relocations was your department responsible for in 1984?

(a) 0-9 37%
(b) 10-19 9%
(c) 20-49 16%
(d) 50-99 9%
(e) 100-199 12%
(f) 200-299 6%
(g) More than 300 10%

6. Approximately how many intrastate employee relocations was your department responsible for in 1984?

(a) 0-9 64%
(b) 10-19 11%
(c) 20-49 13%
(d) 50-99 5%
(e) 100-199 4%
(f) 200-299 1%
(g) More than 300 2%

7. Does your company have a centralized transportation department- that is, from the main corporate office versus regionally?

(a) Yes 67%
(b) No 33%

8. If you answered "Yes" to question 7, does your company's centralized transportation department (circle appropriate response to each question) . . .

(a) Yes Control air carrier selection? 67%
(b) Yes Control freight carrier selection? 84%
(c) Yes Control household goods carrier selection? 79%
(d) Yes Handle office relocations? 58%
(e) Yes Recommend site and space selection for office relocations? 26%
(f) Yes Handle air travel via commercial airline? 30%
(g) Yes Handle air travel via corporate aircraft? 17%
(h) Yes Handle ground transportation via corporate vehicles? 41%

9. If you answered "No" to question 7, who selects the carrier that is responsible for your employee's move?

(a) The company 51%
(b) The employee 8%
(c) The company and the employee in combination 35%
(d) A relocation firm 3%
(e) Other 3%

10. Which one of the following classifications most accurately describes your company?

(a) Manufacturing 67%
(b) Service (includes government, education, health care, etc.) 26%
(c) Financial 7%

11. Is your company . . .

(a) Multidivisional? 65%
(b) Centralized? 35%

12. Is your company . . .

(a) Regional? 9%
(b) National? 28%
(c) International? 64%

13. Is your company . . .

(a) Publicly owned? 61%
(b) Privately owned? 39%

14. Your company's approximate annual sales for 1984 were . . .

(a) Less than $10 million 5%
(b) $10-$49 million 18%
(c) $50-$99 million 9%
(d) $100-$499 million 29%
(e) More than $500 million 39%

15. How many salaried (that is, non-hourly) people are employed by your company?

(a) Less than 100 17%
(b) 100-499 24%
(c) 500-999 14%
(d) 1,000-1,999 8%
(e) 2,000-2,999 7%
(f) 3,000-5,000 8%
(g) More than 5,000 22%

16. What percentage of those salaried employees did your company move or relocate during 1984?

(a) Less than 5% 73%
(b) 5%-10% 17%
(c) 11%-15% 5%
(d) 16%-20% 2%
(e) More than 20% 3%

17. Which one of the following categories most accurately describes the frequency with which an average salaried employee of your company can reasonably expect to be moved?

(a) Every year or more often 1%
(b) Every second year 6%
(c) Every third year 14%
(d) Every fourth year 5%
(e) Every fifth year 5%
(f) Less frequently than once every five years 70%

18. In 1984, how many of your transferred employees were women?

(a) None 32%
(b) Less than 5% 41%
(c) 5%-10% 18%
(d) More than 10% 9%

19. Do you anticipate that the number of employees your company will move during 1985 will . . .

(a) Increase from the number moved in 1984? 21%
(b) Decrease? 18%
(c) Remain about the same? 61%

20. Comparing the number of employee transfers in 1984 with 1983, the 1984 number . . .

(a) Increased greatly versus 1983 16%
(b) Increased moderately versus 1983 33%
(c) Decreased greatly versus 1983 4%
(d) Decreased moderately versus 1983 9%
(e) Remained about the same 38%

21. If the number of employee transfers changed from 1983 to 1984, what external conditions had the most significant impact on that number? Check each applicable response.

(a) Economic conditions 31%
(b) Energy 1%
(c) Political conditions 2%
(d) Growth of industry 27%
(e) Lack of qualified people locally 16%
(f) Reorganization 30%
(g) Plant closings/openings 20%
(h) Other 7%

22. What internal company conditions affected the change in the number of employee transfers? Check each applicable response.

(a) Increased production 18%
(b) Decreased production 7%
(c) Expansion of facility 22%
(d) Closing of facility 18%
(e) Expansion into new territories 23%
(f) Budget constraints 8%
(g) Acquisitions/mergers 15%
(h) Corporate reorganization 27%
(i) Relocations 21%
(j) Promotions/resignations 40%
(k) Other 6%

PART TWO--Corporate Moving Policies

23. How has your corporate moving policy changed during the last two years? Check each applicable response.

(a) Increased housing assistance with housing problems 19%
(b) Improved insurance programs 17%
(c) Exceptions to the policy are made if individual circumstances so warrant 26%
(d) Expanded benefits other than housing assistance 12%
(e) Has not changed 56%
(f) Decreased benefits 2%

24. How is information about your company's employee transfer policy made known to your employees?

(a) Employee is provided a detailed handbook or brochure describing all procedures and conditions 10%
(b) Employee is provided printed material describing company policies, and this information is also explained by authorized personnel within the company 40%
(c) Pre-move counseling is provided within the company 29%
(d) There is no set policy--each case is handled individually and explained on a one-to-one basis 20%
(e) Professional counseling is provided by a relocation firm 2%

25. How does your company handle moving expense reimbursement?

(a) Full reimbursement of moving expenses 85%
(b) Partial reimbursement based on salary, position, tenure, etc. 13%
(c) No reimbursement of moving expenses 2%

26. Besides the packing and transportation of household goods, does your company allow the relocating employee (circle appropriate response to each question) . . .

(a) Yes To move an automobile at company expense? 79%
(b) Yes To move a second automobile at company expense? 53%
(c) Yes To move a boat at company expense? 38%
(d) Yes To have belongings picked up from a secondary residence (summer home, relative's home, etc.)? 54%
(e) Yes To hire temporary maid service at either the old or the new residence? 8%
(f) Yes To move unlimited weight? 70%
(g) Yes Permanent storage of some possessions? 16%
(h) Yes To move collections of highly valuable objects like statuary, paintings, and antiques? 65%
(i) Yes To move pets? 45%
(j) Yes To move recreation and lawn equipment? 83%

27. How many expense-paid trips does your company allow an employee in order to find housing in the new location?

(a) None 1%
(b) One 34%
(c) Two 50%
(d) Three 9%
(e) More than three 6%

28. What is the average number of days allowed for a house-hunting trip?

(a) 1-2 13%
(b) 3-4 47%
(c) 5-6 24%
(d) More than 6 17%

29. How many expense-paid, house-hunting trips does your company allow the spouse to accompany your employee?

(a) None 4%
(b) One 41%
(c) Two 45%
(d) Three 6%
(e) More than three 4%

30. With regard to buying or selling an employee's home, does your company or its authorized representative (circle appropriate response to each question) . . .

(a) Yes Pay none of the selling costs 24%?
(b) Yes Pay only the real estate commission? 14%
(c) Yes Pay all of the fees connected with the purchase or sale of the house (lawyer, title, land surveys, etc.)? 53%
(d) Yes Guarantee a sale price for the employee's former residence? 33%
(e) Yes Actually purchase the employee's former residence? 39%
(f) Yes Pay a lease-termination penalty? 56%
(g) Yes Assist in the sale of a vacation home? 4%
(h) Yes Offer no assistance in the new location? 20%
(i) Yes Assist with the arrangement of a mortgage or swing loan? 41%
(j) Yes Pay a cash bonus? 31%
(k) Yes Offer a mortgage-interest differential? 52%
(l) Yes Offer a cost-of-living differential? 23%

31. If your company will buy an employee's former residence--if no other buyer can be found within a reasonable time--how do you determine the sale price?

(a) Pay the employee's asking price 1%
(b) Pay the employee the appraised value 16%
(c) Negotiate with the employee 6%
(d) Pay the average of several appraisals 58%
(e) Arrange with a national realtor to act on behalf of the company and the employee 20%

32. Does your company's moving policy allow more benefits for new hires or for transferees?

(a) New hires 2%
(b) Transferees 51%
(c) No difference 47%

33. During 1984, what was the average cost per domestic move to your company for such "moving extras" as relocation firms; motel accommodations; family transportation; meals; maid service; pre-move, house-hunting trips; appliance servicing, and similar items? Exclude any salary increases, the cost of van line services, housing compensation, and financial assistance to employees disposing of former residences.

$ 11,202

34. During 1984, what was the average cost per domestic move to your company for direct van line packing and transportation services? Exclude "moving extras" as described in question 33.

$ 5,573

35. Moving costs--"extras" and direct van line packing and transportation services--are what percentage of your company's total cost of relocating an employee?

(a) Less than 10% 23%
(b) 11%-20% 23%
(c) 21%-30% 13%
(d) 31%-40% 10%
(e) 41%-50% 10%
(f) More than 50% 20%

36. Has that percentage increased or decreased during the past five years?

(a) Increased 38%
(b) Decreased 12%
(c) Stayed about the same 52%

37. If your company arranges for the movement of household goods in connection with employee relocations, does it transport the goods . . .

(a) At a released rate of 60¢ per pound, per article? 34%
(b) With declared value protection (depreciation value)? 24%
(c) With full replacement value protection? 42%

38. If your company ships at a released rate (60¢ per pound, per article), is your company . . .

(a) Self-insured at full replacement cost? 45%
(b) Self-insured at a declared value protection? 16%
(c) Instructing the carrier to settle as fully insured and charging the difference to your insurer? 23%
(d) Instructing the carrier to settle at a released rate and having the relocating employee submit a second claim to your insurer for the difference? 16%

39. If your company uses the declared value protection, what do you feel is the appropriate dollar-per-pound valuation?

(a) Less than $3.00 46%
(b) $3.00-$3.99 34%
(c) $4.00-$4.99 13%
(d) $5.00-$5.99 5%
(e) More than $6.00 2%

40. If your company does not currently arrange for full replacement value protection, are you planning to make that change?

(a) Yes 16%
(b) No 84%

41. If your company uses replacement value protection (circle appropriate response to each question) . . .

(a) Yes Is your company self-insured under an in-house risk management program? 31%
(b) Yes Does your company arrange coverage from the van line? 65%
(c) Yes Does your company secure insurance from an insurance carrier or carriers? 35%

42. How frequently is an employee's relocation affected by the employment status of that employee's spouse?

(a) Almost always 6%
(b) Frequently 29%
(c) Seldom 46%
(d) Never 19%

43. If a relocating employee's spouse is employed full-time with another company, does that situation . . .

(a) Increase your company's relocation complications? 50%
(b) Decrease the complications? 2%
(c) Cause the complications to remain about the same? 49%

44. How does your company assist, if at all, an employee's spouse in finding employment in the new location?

(a) No assistance 82%
(b) Pay job-finder's fee 3%
(c) Find employment within the company 5%
(d) Find employment outside the company 9%
(e) Pay spouse's full or partial salary until hired 1%

45. Did at least one of your employees decline the opportunity to relocate during 1984?

(a) Yes 69%
(b) No 31%

46. If you answered "Yes" to question 45, how many employees--as a percentage of your company's work force--who were offered transfers declined the opportunity to relocate during 1984?

(a) Less than 2% 62%
(b) 2%-4% 20%
(c) 5%-7% 5%
(d) 8%-10% 5%
(e) More than 10% 8%

47. If you answered "Yes" to question 45, did the number of employees declining relocation during 1984 . . .

(a) Increase from the 1983 level? 18%
(b) Decrease? 7%
(c) Remain about the same? 75%

48. What reasons did employees give for declining relocation?

(a) Cost of living in the new location 31%
(b) Family ties 28%
(c) Housing/mortgage concerns 24%
(d) Spouse's employment 25%
(e) No desire to move 24%
(f) Climate 8%
(g) Other 9%

49. Does declining the opportunity to relocate usually hinder an employee's career?

(a) Yes 42%
(b) No 58%

50. During which one of the following periods of the year did your company make most of its moves?

(a) January-March 9%
(b) April-May 9%
(c) June-September 69%
(d) October-December 13%

51. If the greatest number of your company's moves occurred during the summer (June through September), what was the principal reason?

(a) Traditional school-year calendar 74%
(b) Other 26%

52. What is the average age of your company's most frequently transferred salaried employees?

(a) Less than 25 years 2%
(b) 25-30 years 14%
(c) 31-35 years 41%
(d) 36-40 years 35%
(e) 41-45 years 7%
(f) More than 45 years 2%

53. Which one of the following categories of your company's work force is most likely to experience the greatest number of relocations?

(a) Sales 39%
(b) Plant/facility management 17%
(c) Engineering 16%
(d) Data processing 1%
(e) Administration 12%
(f) Research and development 2%
(g) Finance 4%
(h) Marketing 10%

54. Does your company have contractual agreements for the transportation of . . .

(a) Products? 7%
(b) Displays and exhibits? 5%
(c) Employee relocations? 88%

55. What is the salary range of your company's most frequently transferred salaried employees?

(a) Less than $15,000 0%
(b) $15,000-$20,000 3%
(c) $21,000-$25,000 4%
(d) $26,000-$30,000 23%
(e) $31,000-$40,000 49%
(f) More than $40,000 21%

PART THREE--Transportation and the Regulatory Environment

56. Since the passage of the Household Goods Transportation Act of 1980, which one of the following programs or services has been the most beneficial to your company?

(a) Guaranteed price 14%
(b) Replacement value protection 7%
(c) Volume discounts 32%
(d) Contracts 35%
(e) Guaranteed pickup and delivery 12%

57. Does your company have contractual agreements with . . .

(a) One carrier only? 14%
(b) More than one carrier? 59%
(c) None of the carriers? 26%

58. If your company entered into a contract carriage agreement during 1984, what was the primary reason?

(a) Cost 55%
(b) Service 25%
(c) Reliability 20%

59. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?

(a) Excellent 50%
(b) Good 41%
(c) Fair 5%
(d) Poor 4%

60. Does your company use the services of a relocation service or a brokerage firm? Check each applicable response.

(a) Relocation service 21%
(b) Brokerage firm 6%
(c) Relocation and brokerage services not used 56%

61. If you used a relocation service or a brokerage firm in 1984, which services did it provide? Check each applicable response.

(a) Counseling about the planning and details of moving 8%
(b) Counseling about company policy 3%
(c) Real estate sale and purchase 26%
(d) Orientation tours in the new location 9%
(e) Arrangement of family's transportation and accommodations 3%
(f) Contact of household moving company 5%
(g) Audit and/or payment of invoice 4%
(h) Monitoring of shipment 3%
(i) Assistance with employee claims preparation and submission 4%
(j) Supplementary services (appliances, cleaning, etc.) 2%

82. Rank the following guidelines in terms of carrier evaluation ("1" = the most important).

(a) 1 Service (dependability, flexibility)
(b) 4 Employee feedback
(c) 3 Claims
(d) 2 Price

83. Rank the following guidelines in terms of carrier selection ("1" = the most important).

(a) 1 Service (past performance of carrier agent)
(b) 2 Price
(c) 3 Claims
(d) 4 Reputation

84. In order of decreasing frequency, what household goods carrier did your company use in 1984?

(a) _____ Most frequently used
(b) _____ Next most frequently used
(c) _____
(d) _____

Unavailable

85. Based on your experience, how would you classify the effects of deregulation (or "reregulation," as some observers describe it) on the following industries, in terms of user and provider. Check *one* response for user effects and *one* response for provider effects for each industry.

(a) Airline industry
- (1) Better for all users 33%
- (2) Better for some users 54%
- (3) Worse for all users 7%
- (4) Worse for some users 6%
- (5) Better for all providers 8%
- (6) Better for some providers 49%
- (7) Worse for all providers 12%
- (8) Worse for some providers 31%

(b) General commodity trucking industry
- (1) Better for all users 32%
- (2) Better for some users 59%
- (3) Worse for all users 4%
- (4) Worse for some users 4%
- (5) Better for all providers 7%
- (6) Better for some providers 53%
- (7) Worse for all providers 8%
- (8) Worse for some providers 32%

(c) Household goods moving industry
- (1) Better for all users 36%
- (2) Better for some users 62%
- (3) Worse for all users 1%
- (4) Worse for some users 2%
- (5) Better for all providers 15%
- (6) Better for some providers 54%
- (7) Worse for all providers 5%
- (8) Worse for some providers 26%

(d) Communications industry
- (1) Better for all users 20%
- (2) Better for some users 44%
- (3) Worse for all users 21%
- (4) Worse for some users 16%
- (5) Better for all providers 17%
- (6) Better for some providers 57%
- (7) Worse for all providers 9%
- (8) Worse for some providers 17%

(e) Finance industry
- (1) Better for all users 20%
- (2) Better for some users 65%
- (3) Worse for all users 7%
- (4) Worse for some users 9%
- (5) Better for all providers 18%
- (6) Better for some providers 60%
- (7) Worse for all providers 2%
- (8) Worse for some providers 20%

On behalf of Atlas Van Lines and the entire household goods moving industry, we wish to thank the corporate executives who took the time and effort necessary to complete this questionnaire. Their participation in helping us develop this unique and valuable guideline will contribute greatly to continued improvement in household goods moving services.

Permission is hereby granted to reproduce findings and data, in whole or in part, with credit to Atlas Van Lines, Inc.

Sponsored by Atlas Van Lines, Inc. • 1212 St. George Road • Evansville, Indiana 47711

4-85/AVL/15M
I.C.C. No. MC-79658